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ABSTRACT

This manual provides guidelines for developing and implementing employee educational programs with the cooperation of unions and management. It establishes the need for such programs by explaining the current and future demographics of the workplace, then suggests ways to determine the need for education in any particular company. Information follows on structuring programs, using consultants, and setting up a formal partnership between unions and management. Types of training are described, and the curriculum content and logistics of training are discussed. Finally, student recruitment, costs, funding sources, and evaluation methods are outlined. Appendixes include a bibliography, lists of sources concerning cooperative programs and funding, features of a selected union-management agreement, and a description of a union training and upgrading fund. (KC)

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Training & Upgrading Fund

A Manual for Union-Management Educational Partnerships

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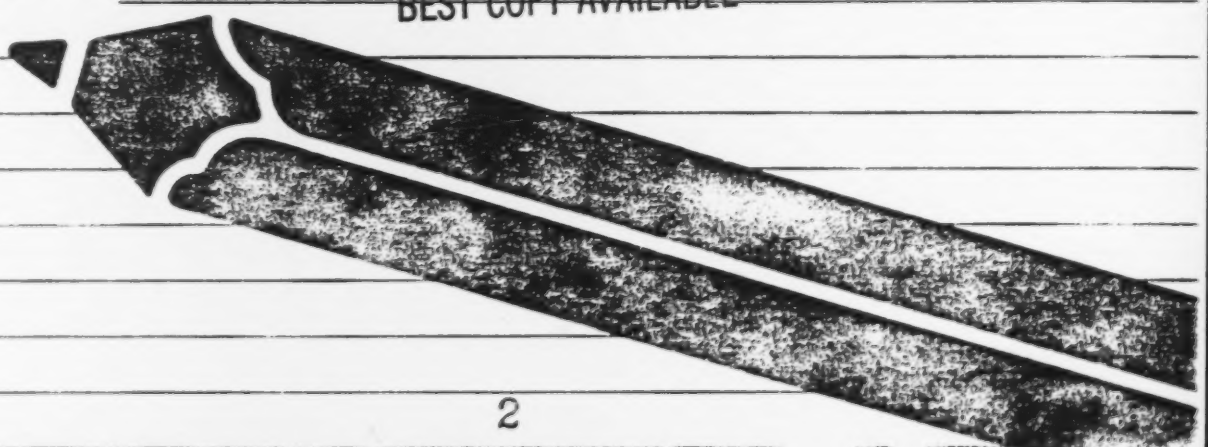

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A Manual for Union-Management Educational Partnerships

James T. Ryan, Ph.D.

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The following experts in adult education were generous enough to review the draft of the booklet:

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Christopher McCarthy
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Tony Sarmiento
William J. Schwabe
JoAnn Weinberger

They made excellent suggestions which I have attempted to do justice.

The District 1199C Training & Upgrading Fund's 15 years of experience has provided much of the material for this work. The Trustees, union and management, have created an innovative and effective training program for workers. The co-chairmen are Henry Nicholas, President of the National Union of Hospital and Health Care Employees, AFL-CIO and R. William Kreider, Personnel Director of the Medical College of Pennsylvania. The staff of the Fund, energetic and committed to union's members, has provided the services which have enabled thousands of health workers to realize their potential and advance in their careers.

Finally, credit must be given to the students, the workers, who had the vision and commitment to the future to demand the creation of the Training and Upgrading Fund and whose participation and suggestions enable the Fund to serve its members.

James T. Ryan, Ph.D
Director, District 1199C
Training and Upgrading Fund

INTRODUCTION

The demographics are inescapable. Already, we find many geographical areas experiencing acute shortages of skilled workers. In Philadelphia for example, employers are recruiting nurses and other health technicians from around the world. There simply are not enough skilled workers in the region and the forecast is for even fewer.

It is in this context that the issue of training and retraining has to be considered. Enlightened employers are already investing more money than ever before in workforce training. In the future, they and many additional employers will have no choice but to continue and expand this effort. Otherwise, they will not have a workforce. This manual looks forward to this situation, where employers, inexperienced in training other than orientation sessions and in-service training, will become involved on a formal and long term basis.

As the Secretary of Labor said in **The Bottom Line**, "The rapid turnover and change of industries and firms will often require workers to change jobs five or six times, transforming the traditional work culture of Americans. Workers will need to be more receptive to retraining and job mobility. Workers with poor basic skills will be ill-equipped for any change. A growing share of our new workers will come from groups where human resources investments have been historically deficient—minorities, women, and immigrants. Employers will increasingly have to reach into the ranks of the less advantaged to obtain their entry-level work force, frequently those with deficient basic skills."

Publication of **The Bottom Line: Basic Skills in the Workplace** was a very significant event. Not so much because the Secretaries of Education and Labor have made any momentous contribution to solving the problem of inadequate eduacational skills among American workers, but because they have given high visibility to a widespread and serious dilemma. Many workers do not have the skills necessary to do their job properly and there are no trained workers to take their place.

In the **Future of Work**, the AFL-CIO studied the changing workforce and its implications. The labor force is becoming more female, more minority, more suburban, and more foreign. As a result "these shifts of people and jobs are enlarging the labor-surplus urban underclass, not only in the older cities of the Northeast and Great Lakes states, but throughout the nation."

RATIONALE

This manual is written with a unionized workplace in mind. Many employers would consider having their employees unionized a disadvantage. However, in terms of providing an educational program, unionization should present an overwhelming advantage if the program is properly undertaken. Most workers regard making a profit as the primary objective of the company. On the other hand, unions are expected to have the best interest of the workers as their primary concern. When both the employer and the union come with the same message, e.g., workplace education is important, it is much more likely that the message will be received. When a proper partnership is built, that is what will happen.

DETERMINING NEED

In almost every case, it will be the employer who first broaches the subject of an inadequacy in workers' skills levels. The union may know or suspect such a lack, but will hardly be in a position to initiate the discussion since need is generally expressed in terms of poor or inconsistent job performance. Typically for example, employers will express the suspicion that employees cannot read directions accurately. The actual needs assessment is a task which should be done on a cooperative basis, as part of the actual educational program. BCEL's **Job-Related Basic Skills** gives some specific questions employers might want to ask themselves in deciding on whether a program is feasible or necessary.

The assessment of the skills of individual workers is an especially delicate issue. In the **Bottom Line**, the Secretaries of Labor and Education propose workpalce literacy audits. Such a concept will be unbelievably threatening to workers and generate strong resistance. Presumably, in a unionized situation, there would also be union opposition. The very real suspicion would be that management would use such an audit to eliminate staff who do not meet management's expectation. Why participate and expose yourself to such a threat?

When the Long Term Care industry (Nursing Home) was faced with the imposition of certification of nurses aides by the federal government, the unionized employers were quick to recognize that the union could play a major role in overcoming educational deficiencies which would block the certification of their employees. They were likewise quick to see that confidentiality of individual workers' educational records was crucial to retaining credibility for the educational process.

CONVENING THE PARTNERS

For a variety of reasons, it will probably be management who decides that some kind of action is desirable and hence, thay will initiate a meeting. It is essential to have an atmosphere of true partnership, that a mutual problem exists and that any solution must also be collaborative. It is also essential that joint agreement and understanding is reached before anything is done publicly. Far too often, a union hears about a new initiative from the workers or rumors at the worksite. Then as, an after thought, management chooses to notify the union leadership. Once this happens, the notion of an equal partnership, and therefore co-responsibility, is gone.

STRUCTURE

The degree of structure required will depend to a large extent on the length and complexity of the program envisioned. In any event, the traditional model, frequently used, and required by the Department of Labor when employer funds are involved, is a union-management committee. The composition of such a committee is required to be one half management and one half union. The result of such a structure is that both sides must agree on an issue before it can proceed. But such a structure is not nearly as cumbersome as it might appear to someone unfamiliar with such an arrangement. In fact, it is an excellent guarantee that a solid plan will result.

A formal structure is created by an agreement of trust which is signed by both parties. Such a document lays out how decisions will be made, how funds will be controlled, and how changes will be agreed upon. This need not be a lengthy document but it does establish a formal partnership. Major features in one such agreement are included in Appendix B. The alternative to this formal partnership would be a program which is clearly the responsibility of management and has received some kind of blessing from the union, or a program which is totally union operated.

A management program might appear to an employer to be less restrictive, but it also absolves the union of any responsibility except of being a watchdog or critic. This then, is the first key decision, whether the partnership is to be a formal one, or a management program which is conducted with the union's approval.

CONSULTANTS

In most cases, a consultant is probably a good idea. Employers are generally not set up as educational organizations and usually the new educational needs are beyond the scope of the traditional orientation task and in-service training. The problem is finding the right consultant. The key requirement in choosing a consultant is finding one who has experience in programs teaching adults basic skills. Using this as a prerequisite will probably eliminate most consultants who offer their services. For example, there are many experts from higher education with impressive credentials, but no practical experience dealing with workers or basic skills. On the other hand, there may be free resources available, such as the Mayor's Commission on Literacy in Philadelphia.

ARGUMENTS FOR A FORMAL PARTNERSHIP

A formal, joint, program will work best in most situations for the following reasons:

Credibility

A management initiative to improve workers' skills will be threatening to most workers. This may be the real intent. But if it is, the result will probably be that no real education takes place. In such an emotional atmosphere, the union can be a major asset, supporting the assertion that what is good for the employer really is also good for the worker.

Communication

The union and its structure provides a new and different path by which an educational campaign, its rationale and how it will operate can be communicated to the work force.

Motivation

The single most important factor determining the success of an educational program is the motivation of the learner. For example, the offer to provide basic skills instructions may draw few people. In fact, participation may even be seen as unattractive. There is no obvious advantage to the

worker to participate, no salary increase or promotion. On the other hand, participation may serve to inform the employer that the employee's skills are inadequate and he or she may be a good candidate for layoff.

In contrast, with cooperation from the union, it is quite possible that a career ladder can be created which will offer the hope of eventual advancement and salary increase. For the Hospital Workers Union, by far the largest source of applicants for basic skills instruction are workers who have applied for advanced skills training, been tested by the union, and been told they do not qualify academically. Basic skills are recognized by the workers as the key to their personal advancement. The better performance of their current job is not even a consideration for the worker. But it may be crucial for the employer.

Another argument for training which the union can argue forcefully, is that improved skills offer the worker better job security as well as mobility. The ability to move workers to other tasks is obviously also an advantage to the employer. The union however, can show that it is in the worker's best interest as well.

Learner-Focused Training

A cooperative effort provides an excellent opportunity to provide learner focused or participant driven training. Most educators claim their instruction is centered on the learner. The educator must determine the learner's present status, take into consideration the learner's goals, and then, with the student, design a curriculum and educational materials in view of the learner. All too often however, a teacher can be distracted by the information which he or she wishes to convey, and the learner becomes a secondary consideration.

A related issue is preserving the dignity of the student. Again, theoretically, a good teacher always respects the dignity of the learner. But in the traditional school, the teacher is the adult and the student is a child. But no adult wants to be treated like a child and if training conveys this atmosphere, the educational experience will be less effective.

A union management partnership should be learner centered in the true sense, involving the worker from program development to evaluation. The union is the organization mandated to represent the worker. If a union does its job, it will promote an educational atmosphere and program which is especially conscious of the worker-learner.

A classic case demonstrating the difference between a management program and a cooperative venture was played out in a major Philadelphia Hospital. Management decided to introduce computers in a 25 person unit. The hospital provided the training. Upon completion, 4 of the workers were deemed not to have acquired the necessary skills and were laid off. The union filed a grievance and the case eventually went to arbitration, a long and costly procedure. As a result, the hospital was forced to rehire 2 of the workers. When the institution decided to computerize the whole hospital, they approached the union, and proposed a cooperative effort. The union's Training Fund was able to secure a grant to help with the cost of the instruction. The union provided remedial support and computer literacy instruc-

tion. The institution provided the computer specific instruction using a train the trainer process. As a result, the entire workforce of over 800 employees was successfully retrained and no one was laid off.

TYPES OF TRAINING

It is important to recognize the different types of training and to be clear about what is appropriate in the existing situation. Otherwise, there exists the strong possibility that the training may be good but the goal not realized.

Basic Skills/Remediation

Traditionally, Basic Skills Training has been understood as reading, writing, and computation. More recently, writing has been broadened to oral and written communication skills in general. And increasingly, employers are recognizing some knowledge of computers as a basic required skill on the job.

Skills Training

Skills Training is generally understood to be more job specific and more advanced than basic skills. In most situations, Skills Training usually implies preparation for a new job. Generally, but not always, this also means career advancement.

Retraining

Retraining usually means training for a new job, perhaps because the old job is gone. It would also usually be Skills Training in that it would not include basic skills and it would be job specific.

Out Placement Training

Out Placement Training is provided for workers in a layoff situation, frequently funded by Title III of the Job Training Partnership Act (JTPA).

This is short term training, generally consisting of job search skills such as resume preparation, interviewing skills and survival techniques.

CURRICULUM CONTENT

The content of the curriculum will be determined to a large extent by what the needs assessment indicates, the type of training undertaken and by the joint goals. Even with these issues settled, there can remain a large degree of variation in the curriculum chosen. For example, for many, the content of basic skills instruction is simply the three R's. So many employers and educators working together have more accurately identified the deficiencies in the work force and have expanded the concept of basic skills to include such skills as communication skills (including oral communication), problem solving, group effectiveness, and leadership, and computer literacy. Notable in this regard is the work of the American Society for Training & Development.

LOGISTICS OF TRAINING

The time and place of an educational program can determine its success or failure. Obviously, a program has to be offered at a time when it is possible

and convenient for workers to attend. The location of a program is equally important but more subtle to determine. Often it is assumed that a program at the worksite is convenient and therefore more attractive to workers. Sometimes, this is not so. We have frequently encountered situations where workers prefer to travel to another location such as the union hall, rather than attend class at the worksite. Participating in a basic skills class in the workplace can have a stigma attached. From the experience of the Hospital Workers Union, Friday is definitely a bad day for attendance.

RECRUITMENT

Recruitment is the perfect example of the advantages of a cooperative approach because the resources of both union and management are available. In addition to management's communication to workers, the union structure can also publicize educational programs. Union meetings present a good opportunity for a discussion and explanation of what is proposed. On many occasions the Hospital Workers Union has worked with management to endorse programs and encourage participation. Typically, posters invite workers to a first session which is jointly sponsored by the union and management. At the meeting, both management and the union would welcome attendees and stress the importance of the project, before the training staff would take over and run the program. The results have been far better than when either the union or management conducted a program.

COST OF TRAINING

Training costs money. There are a variety of sources from which to get money in addition to the employer and the employee. However, it is unlikely that these sources can be successfully tapped without some source of start up support.

There may be some support services available. For example, the Human Resources Development Institute (HRDI), is the arm of the AFL-CIO which is fixed with the responsibility of assisting local unions on training issues. Some funding sources, such as the local Private Industry Council, funded by the Job Training Partnership Act, may also provide staff assistance in developing a proposal. A problem in relying on a source such as this is that they know their system and their agenda but it may or may not fit the situation in which you find yourself. The reality is that in most situations where serious training is contemplated, the employer will have to invest some up front money to assure a successful program.

SOURCES OF FUNDING

Presumably, the first source of funding is the employer. The American Society of Training & Development provides interesting data on the amount companies spend for training. And the ASTD insists that business will have to spend a great deal more in the future based upon the character of the prospective work force. Depending upon the type of training involved, there are other sources of funding available to supplement the initial investment. For example, under the Adult Education Act, federal funds are allocated to the individual states, who in turn distribute funds on a local level for adult basic education instruction. Skills training is funded by the Job Training Partnership Act, the federal jobs training system, and the Vocational Education

Act. Capturing any of these funds implies a permanent educational program with some sophistication. However, a program might be able to take advantage of these sources through an existing training mechanism such as the local school district, community college, or literacy training agency.

EVALUATION

Evaluation of a program can be done in terms of the employer, the worker, or the union. It is important that any evaluation be done in terms of the program's and the workers' objectives. Obviously this underscores the importance of establishing agreed upon objectives at the outset of the venture. When this is not done, it will be difficult to devise a method of evaluating the outcome. And, almost certainly, someone will not be pleased because of unrealized expectations. A valid evaluation of a program is better assured when the program is a union management initiative because of increased trust of the process.

CONCLUSION

In a unionized setting, a partnership in training is the perfect solution with both sides profiting. Actual experience has also shown widespread satisfaction with establishing programs, some of which have prospered for years. The current literacy crisis may provide a blessing in disguise if it forces management and unions to initiate educational partnerships which may broaden to other aspects of their relationship.

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Sticht, T. G. and Mikjulecky, L., **Job-related Basic Skills; Case and Conclusions.** Columbus: The National Center of Research in Vocational Education, Ohio State University.

COOPERATIVE PROGRAMS/SOURCES OF INFORMATION

AdvanceE
Pennsylvania Department of Education
333 Market Street
Harrisburg, Pennsylvania 17120

AFL-CIO Human Resources Development Institute
815 16th Street, N.W.
Washington, D.C. 20006

Cambridge the Adult Education Co.
888 Seventh Avenue
New York, N.Y. 10106

Contemporary Books, Inc.
180 North Michigan Avenue
Chicago, IL. 60601

District 1199C Training & Upgrading Fund
1319 Locust Street
Philadelphia, Pennsylvania 19107

District Council 37 Education Fund
125 Barclay Street
New York, New York 10007

Ford-UAW National Development & Training Center
P.O. Box 6002
Dearborn, Michigan 48121

Harcourt Brace Jovanovich, Publishers
Chicago, IL. 60601

Institute for the Study of Adult Literacy
Penn State University
248 Calder Way, Suite 307
University Park, Pennsylvania 16801

McGraw-Hill Book Company
1221 Avenue of the Americas
New York, N.Y. 10020

National Alliance of Business
1015 156th Street, N.W.
Washington, D.C. 20005

Project PLUS
4802 Fifth Avenue
Pittsburgh, Pennsylvania 15213

Publishers Test Service
2500 Garden Road
Monterey, Ca. 01867

The Seafarers Harry Lunderberg School of Seamanship
Pitney Point, MD. 20674

United Food & Commercial Workers International Union
1775 K. Street, N.W.
Washington, D.C. 20006

United Steelworkers of America
Five Gateway Center
Pittsburgh, Pennsylvania 15222

APPENDIX A

Funding Sources for the District 1199C Training & Upgrading Fund.

One of the benefits of a union-management partnership is the potential of new sources of funding. In order to illustrate this possibility, the following are sources which have funded one such partnership.

Advanced Technology Center of Southeastern Pennsylvania
Comprehensive Employment and Training Act (CETA)
Job Training Partnership Act (JTPA)
Pennsylvania Department of Education
Pennsylvania Department of Labor and Industry
Pennsylvania Department of Community Affairs
U.S. Department of Health and Human Services
Pew Memorial Trust
William Penn Foundation
Mayor's Commission on Literacy
Henrietta Tower Wurts Memorial
Federal Mediation and Conciliation Service

APPENDIX B

FEATURES OF THE TRUST AGREEMENT BETWEEN DISTRICT 1199C AND COOPERATING EMPLOYERS

Board of Trustees composed of 9 union representatives and 9 management representatives.

One percent of payroll contribution by management.

For purposes of voting the union has one vote and management has one vote, determined by a majority of each group.

In case of a deadlock, an arbitrator decides the issue (such a situation has never occurred).

A quorum for any meeting is five union trustees and five management trustees.

Four Board Officers, Chairman, Co-chairman, Secretary, and Treasurer, which rotate each year.

APPENDIX C

DESCRIPTION OF THE DISTRICT 1199C TRAINING & UPGRADING FUND

The Fund is a union-management educational trust composed of 40 of the major health care providers in Southeastern Pennsylvania and Southern New Jersey and the National Union of Hospital and Health Care Employees, AFL-CIO. The Fund was established in 1973 and has provided a variety of educational benefits to thousands of union members and the general public.

The most attractive benefit offered by the Fund is a full time scholarship program. However, the Fund offers tuition reimbursement benefit. A worker can receive up to $2100 a year for taking courses in any field. The Fund also offers a variety of in-house courses such as basic skills, computer literacy, word processing, medical records, medical terminology, and medical abstracting.

But the heart of the Fund program is the full time program leading to career advancement and salary increments. Under this program, the worker comes off the job on a leave of absence, has the education costs paid, and receives a stipend which ranges from $165 to $190 per week depending on the number of dependents. In return, the worker has no obligation to the employer or the union.

The full time program drives the other programs. Basic skills classes for example, are usually filled by applicants for full time training who find they are not qualified and need remedial assistance. The tuition reimbursement plan is frequently used by students who are making up pre-requisites to enter full time schools of allied health in the Philadelphia area. If existing programs do not meet a current need, programs are developed by the Fund and delivered by one of the hospitals as a subcontractor.

Starting in 1975, the Fund began receiving public money and training the general public. The original trust agreement had foreseen and authorized this since a role of the Fund was to alleviate existing shortages of health care personnel in the region. More recently, this has been expanded to a joint, comprehensive program to train registered nurses which has brought management and the union together in ways neither side ever imagined.

The structure of the Fund allows the rapid development of new programs to meet current needs. On the other hand, programs can also be quickly eliminated when the need is met. As its mission, the Fund attempts to provide training which is needed and not being adequately provided by some other agency. In general, this has meant one year programs which are articulated with advanced programs provided by the schools of allied health. As a result, the Fund is able to accommodate the full range of members' educational aspirations, from basic reading to medical school.